Middle East And Africa Travel Retail Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Travel Retail & Duty Free (Retail)
> **Source:** https://www.mordorintelligence.com/industry-reports/middle-east-and-africa-travel-retail-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 8.24 billion
Projected Forecast (2031)	USD 8.24 billion
Growth Rate (CAGR)	13.61 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Middle East And Africa Travel Retail industry](images/chart_2.png)

![Middle East And Africa Travel Retail Market (2026 - 2031)](images/chart_3.png)

![Middle East And Africa Travel Retail Market: Market Share by Product Type](images/chart_4.png)

![Middle East And Africa Travel Retail Market: Market Share by Distribution Channel](images/chart_5.png)

![middle east comp land.png](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2019 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 7.25 Billion |
Market Size (2026) | USD 8.24 Billion |
Market Size (2031) | USD 15.59 Billion |
Growth Rate (2026 - 2031) | 13.61 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Middle East And Africa Travel Retail Market Analysis by Mordor IntelligenceThe Middle East and Africa travel retail market size was valued at USD 7.25 billion in 2025 and estimated to grow from USD 8.24 billion in 2026 to reach USD 15.59 billion by 2031, at a CAGR of 13.61% during the forecast period (2026-2031). Investment in airport capacity across the Gulf is widening retail footprints and improving dwell-time economics, which supports higher conversion and average transaction value in the Middle East and Africa travel retail market. New concourses and gates at major hubs like Hamad International Airport add premium storefronts, curated concepts, and more square meters per passenger, which improves category visibility and exclusivity. Policy support is also strong, as Saudi Arabia’s 2025 arrivals reached 122 million under Vision 2030, which reinforces demand for retail at both primary and secondary airports [1]Saudi Press Agency, “Saudi Arabia Welcomes 122 Million Visitors in 2025,” Saudi Press Agency, spa.gov.sa. Trade integration is rising, with intra-African trade growing in 2024, which increases cross-border corporate travel and supports a deeper duty-free assortment at African gateways. Digital payment rails and mobile pre-order partnerships are streamlining checkout across the Middle East and Africa travel retail market, reducing friction for travelers who prefer wallet-based or alternative payment options.

Key Report Takeaways
* By product type, Fragrances and Cosmetics led the Middle East and Africa travel retail market with 32.36% of the market share in 2025, while Food and Confectionery is projected to expand at a 13.36% CAGR to 2031.
* By distribution channel, Airports held 87.36% of the Middle East and Africa travel retail market share in 2025, while Cruise Liners recorded the highest projected CAGR at 17.76% through 2031.
* By traveler demographics, Leisure Travelers accounted for 47.38% of the Middle East and Africa travel retail market share in 2025, while Medical and Wellness Tourists are advancing at a 15.25% CAGR through 2031.
* By geography, GCC countries represented 42.76% of the Middle East and Africa travel retail market share in 2025, while Sub-Saharan Africa is projected to grow at a 14.65% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Middle East And Africa Travel Retail Market

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rapid expansion of airport capacities across GCC hubs	+3.2%	GCC core (Saudi Arabia, UAE, Qatar), spill-over to secondary hubs (Oman, Bahrain)	Medium term (2-4 years)
Increasing outbound leisure spending by MEA residents	+2.1%	GCC countries, South Africa, Nigeria	Short term (≤ 2 years)
Tourism diversification policies like Saudi Vision 2030	+2.8%	Saudi Arabia, UAE, Qatar, Egypt	Medium term (2-4 years)
Pilgrimage traffic boosts Saudi Arabia's secondary airports	+1.5%	Saudi Arabia (Madinah, Tabuk, Jeddah)	Short term (≤ 2 years)
AFCFTA driving growth in intra-African business travel	+1.9%	Sub-Saharan Africa (ECOWAS, SADC, EAC regions)	Long term (≥ 4 years)
Mobile pre-orders and e-wallets transform duty-free ecosystems	+1.7%	GCC countries, South Africa, Nigeria, Kenya	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Global operators and airport-owned retailers shape the competitive dynamics of the Middle East and Africa travel retail market, and the field balances strong incumbents with expansion-minded challengers. A leading global operator reported USD 17.06 billion (CHF 13.47 billion) in 2024 turnover following its merger integration, and it expanded further in North Africa, announcing 15 store concessions in Tunisia in early 2025, extending its footprint across the Mediterranean gateway network. Another global player increased exposure to Saudi Arabia and consolidated capabilities in Europe through a 2025 acquisition, which strengthens group-wide procurement and supplier terms that can benefit Middle East operations. Airport-owned retailers in the Gulf leverage vertical integration to align terminal design, traffic management, and retail strategy, thereby gaining an execution edge in new concourse openings and supporting premium shop-in-shop formats.

Joint-venture models are prevalent at large North African and Southern African gateways, and one European family-owned retailer highlighted that the Middle East and Africa accounted for a third of group turnover in 2024, supported by major openings in Saudi Arabia and long-standing partnerships in South Africa. Across the Middle East and Africa travel retail market, operators are investing in data, loyalty, and automation to boost labor productivity and improve campaign precision during peak transfer periods. Payment innovation underpins execution, with wallet integrations and crypto acceptance rolled out in select Gulf stores to reduce checkout friction and appeal to tech-forward cohorts. Regulatory settings for payments and biometrics are maturing under telecom and financial authorities, stabilizing the environment for the deployment of digital features across terminals. This digitalization tilt is strengthening the resilience of the Middle East and Africa travel retail market as operators optimize pricing, mix, and promotions by time and zone.

Macroeconomic and policy factors shape strategy across subregions, and operators adjust playbooks as oil prices fluctuate and regulatory conditions evolve. Fiscal surpluses in Qatar and the UAE supported consistent investment in terminal retail, enabling on-time delivery of commercial space during major capacity expansions. In Saudi Arabia, aviation and customs authorities are coordinating infrastructure and compliance frameworks that facilitate the scale-up of commercial offerings at primary and secondary airports. The competitive set remains dynamic as new domestic entrants in Saudi Arabia seek to capture a greater share of retail value within national ecosystems, introducing fresh models into the Middle East and Africa travel retail market. The next phase will likely blend premiumization, localization, and omnichannel features, as operators elevate experiences while protecting value tiers in response to oil-cycle sensitivity and varying consumer confidence across markets.

Middle East And Africa Travel Retail Industry Leaders* Lagardère Travel Retail

* The Shilla Duty Free

* Dubai Duty Free

* Qatar Duty Free

* Dufry AG

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Middle East And Africa Travel Retail Market Report ScopeTravel retail in the Middle East and Africa refers to the formal sale of duty-free and duty-paid goods to international travelers within controlled environments, such as airports, seaports, and border crossings.

The Middle East and Africa travel retail market report is segmented by product type (fashion and accessories, wine and spirits, tobacco, food and confectionary, fragrances and cosmetics, other product types), distribution channel (airports, cruise liners, railway stations, other distribution channels), traveler demographics (business travelers, leisure travelers, visiting friends & relatives, medical & wellness tourists, student travelers), and geography (United Arab Emirates, Saudi Arabia, South Africa, Nigeria, Rest of Middle East and Africa). The market forecasts are provided in terms of value (USD).

By Product TypeFashion and Accessories |
Wine and Spirits |
Tobacco |
Food and Confectionery |
Fragrances and Cosmetics |
Other Product Types (Stationery, Electronics, Watches, Jewelry, etc.) |

Segmentation Accordion Item

By GeographyUnited Arab Emirates |
Saudi Arabia |
South Africa |
Nigeria |
Rest of Middle East And Africa |

Frequently Asked Questions

What is the current size and growth outlook for the Middle East and Africa travel retail market in 2026?

The Middle East and Africa travel retail market size is USD 8.24 billion in 2026 and is projected to reach USD 13.87 billion by 2031 at a 13.87% CAGR, supported by capacity expansion and policy-led tourism growth.

Which product category leads the Middle East and Africa travel retail market in 2026?

Fragrances and Cosmetics lead by revenue, with 32.36% share in 2025, while Food and Confectionery have the fastest projected growth to 2031, aided by curated gifting and localized SKUs.

What channels are driving growth in the Middle East and Africa travel retail market?

Airports dominate with 87.36% share in 2025 due to high passenger concentration and expanding concourses, while Cruise Liners show the fastest projected CAGR through 2031 as new terminals and Gulf cruise capacity come online.

Which geographies are most important for the Middle East and Africa travel retail market?

GCC countries account for the largest share at 42.76% in 2025, given their hub airports and high dwell times, while Sub-Saharan Africa is the fastest-growing region due to trade integration, visa openness, and payments interoperability.

What are the main risks facing the Middle East and Africa travel retail market?

Key risks include political instability in select African subregions, oil-price volatility that can temper GCC spending, and stricter tobacco regulations that raise compliance costs, though operators are mitigating these through portfolio diversification and payment innovation.

Which strategic moves defined 2025 in the Middle East and Africa travel retail market?

Notable moves included Avolta's 15-store entry into Tunisia, Lagardère's acquisition of a 70% stake in Amsterdam Schiphol Duty Free to boost procurement leverage, and Qatar's new concourses that added 2,700 square meters of retail.